WHBOE
Purchase Order Requisition System
“Button” Manual

When you login to your pc, you should see buttons across the top of your screen

IMPORTANT:

- After you click a button, the system will download data from a server. It can take up to 2 minutes for a complex process to run. If the button stays “pushed” (grayed out), the system is still working. Please be patient.

- There are limits set on the different searches. The RO/PO Inquiry is limited to 100 documents. The Approve/Return button is limited to 10 documents.
The first thing you need to do is set the system with your school and user name. Click on the **Set School/User** button – you will see this screen.

Click on the drop down arrows to select your school name and user name.

Click the **Submit** button.

Normally, you only have to do this ONE time, and it will remain set to your name. **Do not click on the Set School/User button to check, as it will always show you the default setting.**

The exception to this is if you need to act as a proxy for another user. In that case, you would need to select a different school/username, rather than yourself. When you are finished acting as the other user, you should run **Set School/User** again to reselect your own school/username.
To locate Requisition Orders (RO's), click on the **RO/PO Inquiry** button. This will bring up the search screen. By default, the Requestor (your name) and your school name will appear in the first two fields.

At this point, you can click the **Submit** button and it will produce a list of documents that meet the criteria of any of the fields you used.

Note: The list shows both RO’s and scanned attachments. These can be easily differentiated by the **Name** and also by the **Doc Type**.
To view a selected document, click on it (which will turn it blue) and then click the View button.

This will open an Adobe PDF view of the item selected.

You can easily print the document at this time.

When you are done, click the X in the top right corner.
Important Note: The example search shown here used the secretaries name (Chris Kehoe) in the Requestor field. This search will only find documents in which her email address is entered as the requestor. If you entered someone else’s email address when you created the Requisition (such as a teachers), this specific search may not produce the desired results.

To run a search of all documents for a school, click the RO/PO Inquiry and delete the Requestor field. This will produce all documents for a school, regardless of who the requestor is.

Note: the Requestor ID field now shows multiple names.
Searching for a specific RO or document

The quickest and most focused search you can run is to locate a specific RO number. You would run this search when you know the RO number (or PO number) and you want to see its status and any related attachments.

In this case we will search for RO number 1294. Click the RO/PO Inquiry button and enter 1294 in the Requisition # field. Also, delete your name from the Requestor field.

This particular search located two documents; the RO and the attached Order.
To associate a scanned document with a RO, you will click the **Attach Document** button.

In this example, we will switch to Pagels and click the **Submit** button.

A list of all the documents that have been scanned into the PO folder will be listed. In this example, we have 4 documents listed.

*Note: the 2\textsuperscript{nd} and 3\textsuperscript{rd} documents below are named properly
Please use this format in the future when naming scanned documents: RO#-doc type-date.pdf
For Example: 369-order-061909.pdf*

Click on the desired attachment to view it.
To Attach the desired document to the RO, check the box next to it and click the **OK** button.

The Attachment screen will appear.
Select the correct **Doc Type** by clicking the drop down arrow and selecting the correct item.

For a Requisition that has not been approved yet, select **PO Attachment**.

Fill in the **Requisition #** and the **Email** address of the Requestor. Optional – fill in the **Notes** field.

Click the **Submit** button

You should see a brief message in the bottom right corner stating that the document is uploading.
If you have Approval responsibility, click on the **Approve/Return** button to get a list of up to 10 documents to be approved.
Click on a document to view it in the Preview screen.
Check the box next to the document you want to Approve or Return.

Click the **Operations** button.

Select Approve or Return (to Requestor) from the list and click **Execute**.

After you have processed a RO, you will be returned to the list of the remaining 9 RO’s. Continue processing until you have done all 10. Then click the **Approve/Return** button again to get a new list.